

GUIDE

Microsoft 365 Copilot for Financial Services Firms



Chapman Technology Partners



Unlock New Levels of Productivity and Compliance with AI

In the highly regulated world of financial services, time, accuracy, and trust are everything. Whether you're a financial adviser, mortgage broker, accountant, or wealth manager, your clients depend on you to provide timely advice and manage complex information with precision.

That's where Microsoft 365 Copilot comes in - a secure, AI-powered tool designed to save time, reduce manual work, and enhance client communications, all within the Microsoft 365 tools you already use.

At Chapman Technology Partners, we specialise in cyber security-first IT support for regulated industries. We help firms like yours integrate the right technology securely - and Microsoft 365 Copilot is one of the most powerful advancements we've seen for professional services.

What Is Microsoft 365 Copilot?

Microsoft 365 Copilot is an AI assistant built directly into the Microsoft 365 apps you already rely on - Outlook, Excel, Word, Teams, and more.

It helps professionals complete tasks faster, communicate more clearly, and extract value from data - while maintaining the strict security and compliance standards the financial sector demands.



75% of UK financial services firms are already using AI, with an additional 10% planning to adopt it within the next three years.

Source: Joint survey by the Bank of England and the Financial Conduct Authority

Why it Matters for Financial Services Firms

1. Work Faster and Smarter - Without Cutting Corners

- **Outlook:** Summarise long client email threads, draft replies in your tone of voice, and manage inboxes more effectively saving hours each week.
- **Word:** Draft client-facing documents, financial summaries, reports, and templates in seconds and tailor them to each client automatically.
- **Excel:** Quickly analyse financial data, identify patterns, and build charts without writing complex formulas.
- **Teams:** Summarise meetings with clients or colleagues and automatically generate action points and follow-ups.
- **PowerPoint:** Turn your ideas into polished, compliant presentations and client proposals fast.

2. Enhance Compliance and Reduce Human Error

Financial firms are under constant pressure to stay compliant and audit-ready.

Copilot helps to:

- Ensure consistency in communications and documentation.
- Reduce manual data entry and related errors.
- Record, summarise, and archive key client conversations within Microsoft Teams.

We'll help you set up permissions and controls to keep your firm aligned with FCA expectations and data protection requirements.

3. Microsoft Sales Copilot – For Relationship-Driven Firms

Sales Copilot helps you manage leads and client relationships more effectively, especially if you're using a CRM.

Microsoft Sales Copilot:

- Surfaces relevant client insights from Outlook, Teams, and CRM systems.
- Suggests next steps based on recent conversations.
- Helps you tailor communications for high-value prospects or clients.

Real-World Use Cases

- A mortgage broker drafts personalised offer summaries in Word with just a few prompts.
- An IFA uses Excel and Copilot to model investment scenarios and present them clearly.
- An accountancy firm uses Teams and Copilot to keep track of quarterly client reviews.
- A wealth manager saves hours a week by automating email responses and preparing client-ready presentations in PowerPoint.

Getting Started with Copilot in Your Firm

1. **Microsoft 365 Licensing:** We'll help you confirm if your subscription includes Copilot or recommend the right plan.
2. **Secure Deployment:** Our team ensures Copilot is rolled out with strict access controls, so only the right people can see sensitive data.
3. **Staff Training:** We provide tailored training for your team, so they can use Copilot confidently and securely.
4. **Ongoing Support:** We offer ongoing guidance to ensure Copilot continues to support - not disrupt your compliance workflows.

Let's Talk

At Chapman Technology Partners we're not just IT providers we're trusted partners to financial firms across the UK. If you're curious about how Microsoft 365 Copilot can save your firm time, strengthen compliance, and enhance client service, we'd love to show you what's possible.

Get in touch with the experts at Chapman Technology Partners to start your Copilot journey.

www.chapmantechologypartners.co.uk or schedule a 15 minute intro call



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